



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

December 15, 2009

Curt Crandall
Pacific Bell Directory
Mail Stop 40-R-6
St. Louis, MO 61301

Dear Mr. Crandall:

RE: **FINAL MONITORING VISIT REPORT** for Pacific Bell Directory – ET08-0242

Date of the Visit:	9/30/09
Beginning/Ending Time:	10:00am -11:30am
Date of Last Visit:	1/07/09
Visit Location:	Anaheim, CA
Persons in attendance:	Curt Crandall, Senior Manager for Training and Organizational Development, Southwestern Bell (via teleconference); Peggy Kaytis, Training Specialist/Strategic Planning & Development, SBC; Chris Mangels, Training Funding Partners; Ryan Swier, ETP Analyst
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	12/31/07-12/30/09	Agreement Amount:	\$658,800
Training Start Date:	1/16/08	No. to Retain:	600
Date Training must be Completed:	9/30/09	Range of Hours:	24-200
Type of Trainee:	Retrainee	Weighted Ave. Hours:	61

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SAN DIEGO REGIONAL OFFICE
5353 Mission Center Road, Suite 110
SAN DIEGO, CA 92108
(619) 686-1920

FINAL REPORT SUMMARY:

The Agreement was executed on 2/2/08 and training began on 1/13/08. Your staff reported that all training was completed on 7/3/09 which allows for the 90-day retention period to be completed within the term ending date of the Agreement – 12/30/09.

ETP approved an agreement modification on 3/11/08, which added on Computer Based Training (CBT) to the Menu Curriculum with Adobe Illustrator as the subtopic.

INTERVIEW WITH THE CONTRACTOR

The Contractor reported that ETP-funded training has increased employee's skills in continuous improvement, business and computer skills. The contractor stated that they were able to do "more with less" meaning they were able to conduct more training than they would have otherwise completed as a result of the financial support provided by ETP. The biggest advantaged was they were able to avoid layoffs by training existing employees new job skills and move them into different departments (example: print to internet). Pacific Bell Directory had no barriers in implementing the ETP project.

PROJECT STATUS

Trainees Started Training:	640
Trainees Enrolled:	1312
Dropped Following Enrollment:	860
Completed Minimum Training Hours:	434
Completed Training:	434
Completed Retention:	0

The chart below lists the training hours provided to the 434 trainees tracked on-line who reached the specified benchmarks:

NUMBER OF TRAINEES: (434 TRAINEES)	HOURS COMPLETED	PERCENTAGE OF TOTAL ENROLLED
154	24-50	35%
46	51-100	11%
27	101-150	6%
207	151-200	48%

As of the date of the Monitoring report, the Contractor's statistics showed that 434 trainees had completed a minimum of 24 hours of training to qualify for reimbursement. Mr. Swier explained to the contractor that the per trainee reimbursement for class/lab training is based on the total number of training hours completed by each trainee, provided the minimum 24 hours of training and no more than the maximum 200 hours of training are completed, and all other Agreement terms and conditions are met.

The aforementioned 434 retrainees were provided a total of 52,584 hours of Class/Lab and CBT training. Therefore, Pacific Bell Directory can potentially earn \$658,800 in reimbursement (100 percent of encumbered funds), if all Agreement terms and conditions are met. As of the date of this report the Pacific Bell Directory has received \$658,800 of which of which \$0 is considered earned and approved by ETP.

During the visit, Mr. Swier advised the contractor that the final close out invoice must be submitted by 1/30/10, 30 days after the term date of the Agreement (12/30/09).

ATTENDANCE ROSTERS:

During the Monitoring Visit, Mr. Swier randomly selected the attendance records of six enrolled trainees. The review of the records revealed that the trainees had completed 27.50 to 129.50 hours of class/lab training. The review sample consisted of original daily class/lab attendance rosters for training provided from January 24, 2008 through April 10, 2009. Mr. Swier compared the information in the ETP on-line class/lab tracking system with the attendance rosters to ensure that the information was consistent.

The review of the completed rosters revealed that the information on the rosters was in accordance with Title 22, California Code of Regulations, Section 4442, Record Keeping and consistent with information in the ETP on-line tracking report.

AUDIT:

Pacific Bell Directory will be notified in writing if this agreement is selected for an audit, conducted either at your site (field audit) or by telephone (desk audit or "review"). The Audit Notification and Audit Confirmation letters will be sent in advance to allow ample preparation time and will include a list of documents that will be examined by the auditor. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

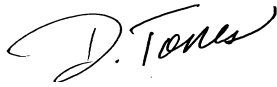
- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding the information contained in this letter, please contact Ryan Swier at (619) 686-1902, or e-mail him at rswier@etp.ca.gov within ten (10) working days from the receipt of this letter.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Torres".

Diana Torres, Manager
San Diego Regional Office

A handwritten signature in black ink, appearing to read "R. Swier".

Ryan Swier, Contract Analyst
San Diego Regional Office

cc: Peggy Kaytis, SBC
Chris Mangels, TFP
Kulbir Mayall, Manager, Fiscal and Certification
Master File
Project File